

# EPIC ADVISORS, INC.

## POSITION DESCRIPTION

POSITION: Internal Sales Specialist	APPROVAL DATE: November 2009
DEPARTMENT: Sales	REPORTS TO: TBD
EMPLOYMENT STATUS: Full-time	WAGE CATEGORY: Exempt GRADE: 41

**PRIMARY FUNCTION:** The primary purpose of this position is to work effectively with the external sales consultants, clients, and prospects as their primary internal sales resource.

### DUTIES & RESPONSIBILITIES:

- Performs general administrative support duties for the sales department and sales consultants, including file management, materials distribution, etc.
- Prepares and distributes various sales reports
- Handles inquiries about products or services and provides prospects with product or service information to assist them in making purchase decisions
- Performs CRM system data maintenance, report writing, data filters, groups and exports, communications management activities
- Provides administrative support and periodic training for ContactWise CRM system as requested.
- Coordinates and manages sales and client conferences, including logistics and planning
- Prepares RFPs and proposals for sales and clients as requested
- Prepares general sales correspondences and documents
- Manages sales prospect “touch-point” calendars, coordinating activities with external sales and executing related strategies
- Supports new client and new plan conversions, including database setup, document distribution and coordination
- Creates and maintains library of sales literature and tools, including but not limited to PowerPoint presentations, product literature, reference lists. Edit and update as needed.
- Coordinate appointment scheduling and make travel arrangements
- Prepares and maintains sales training materials
- Performs other duties as requested by sales

**QUALIFICATION REQUIREMENTS:** The successful candidate must be an organized self-starter with a high energy level and sense of urgency. Candidate must have the ability to extensively demonstrate skills and experiences including, but not limited to, the following:

The requirements listed below are representative of the knowledge, skill and/or ability required.

**EDUCATION and/or EXPERIENCE:** Bachelor’s degree in business related field and a minimum 3 years experience; or equivalent combination of education and experience. Possess an in-depth understanding of the retirement plan industry, financial concepts and client-service strategies helpful.

**LANGUAGE SKILLS:** Ability to read and interpret documents such as procedures manuals and technical procedures.

**COMMUNICATION SKILLS:** Must have superior written and verbal communications skills. Must have the ability to

- (1) Write and proofread proposals and request for proposal responses, sales presentations, routine reports and correspondence as well as sales communications pieces;

- (2) Communicate effectively with prospects and clients via email, phone and physical presentations;  
and
- (3) Project a positive attitude and professional demeanor.

**REASONING ABILITY:** Must be an independent contributor, with the ability to handle multiple tasks, work independently and meet deadlines. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form. Must be proactive in problem identification and resolution.

**OTHER:** Must have existing knowledge of advanced Microsoft Office applications with the emphasis on Word, Access, Excel, and PowerPoint. Must have existing working knowledge of the Adobe suite of tools. Must be familiar with contact management software and be proficient in use of same.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.<sup>(1)</sup> While performing the duties of this job, the employee is regularly required to see, hear and operate standard office equipment including telephone, computer, copier, and fax machine. The employee must occasionally lift and/or move up to 10 pounds.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.<sup>(1)</sup> Some travel may be required.

The noise level in the work environment is usually quiet.

<sup>(1)</sup> *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions*